

STEP THREE

Planning

STEP THREE--Planning

Step Three Planning to Implement Patient and Family Education

QUESTIONS TO CONSIDER:

1. **WHO's** going to do PFCE?
 - A. Who has time?
 - B. Who has adequate staffing?
 - C. What is the role of (insert each staff position) in PFCE?
2. **WHO's** going to select and/or develop and Inventory PFCE materials? (Pamphlets, etc.)
3. **WHEN** is PFCE going to be done?
 - A. Physician's orders?
 - B. Standing Order?
 - C. Initiated by Nurse other health professionals?
4. **WHERE** is PFCE going to occur?
 - A. Classroom/Conference Room?
 - B. Exam Room?
 - C. Lobby?
 - D. Other?
5. **What's** going to be taught?
 - A. What programs are going to be developed?
 - B. What input will each department have?
6. **HOW** will programs be evaluated? A key to successful PI is the continuous assessment of the outcomes.
 - A. How will outcomes be measured?
 - B. Who will develop recommendations for improved processes?

Developing PFCE Policy and Procedure Manuals

Policy and Procedure Manuals are developed according to the assessed needs of the population served. (See the Supplemental Section.) Each department will develop a departmental Policy and Procedure Manual on PFCE that addresses and incorporates:

1. Title Page
2. Introduction
3. Definition of Terms
4. Mission, Vision, Philosophy of Care
5. Purpose/Goals of Practice
6. Functions and Responsibilities
7. General Functions
8. Responsibilities of Clients, Informed Consent
9. Additional Sections for (as desired) date each page
 - Procedures
 - Standing Orders
 - Protocols
10. Orientation Program
11. In-service Education, Continuing Education
12. Quality Assurance, TQM, PI
13. Policies and Procedures Approved by the Governing Board, Medical Staff and Administration
14. Copies Of Current Disaster and Fire Manual
15. Infection Control
16. Safety Policies
17. Preventive Maintenance/Electrical on any Program equipment
18. Organization Chart - Specific to the department with documented relationships to Medical Staff, if any, and
 - Administration (direct or indirect). Dated. Narrative statement also recommended.
19. Organization chart - copy of current, dated, hospital-wide chart on file in the Policy and Procedure manual.
20. Hours of operation, weekends, after-hours, or on call-coverage method.

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21. Job descriptions - for each employee, dated.
22. Record of licenses, registration numbers with dates of expiration, updated regularly and filed in Personnel according to clinic/hospital policy for ongoing verification of current licensure including any teaching or State licenses, certification, RN licensure, CPR, Red Cross, Etc.
23. Copies of respective sections of JCAHO - and other appropriate standards and regulations.

Suggested additional contents for a patient education policy and procedure manual.

Annual Patient Education Work Plan
Budget/Spending Plans for Patient Education
Clinic/Hospital Organizational Chart
Any Grant Proposals for Patient Education
Goals and Objectives Statement
Monthly Reports
Quarterly Reports
Year End Reports
Informed Consent
Patient Right's and Responsibilities
Personnel
Quality Assurance
Position Description
Scope of Work for Patient Education
Any Strategic Planning for Patient Education
Workshops/Training/In-Service Education documentation

Position Descriptions should contain:

1. Scope of Work on Patient, Family, Caregiver Education
2. Measurable criteria on patient education with specific performance standards.

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STEP THREE CHECK LIST PLANNING

Planning to meet the following has been completed:

- ___ **WHO's** going to do PFCE?
 - ___ Time
 - ___ Who will do PFCE
 - ___ The role of each staff position in PFCE has been determined.
- ___ Each department has selected and/or develop and Inventory PFCE materials.
- ___ It has been determined **WHEN** is PFCE going to be completed.
- ___ Referral procedures have been developed.
- ___ **WHERE** is PFCE going to occur has been determined.
- ___ Lesson or teaching plans has been developed by every department.
- ___ A method of program evaluation is developed to provide continuous assessment of the outcomes.
- ___ Position Descriptions have been assessed for a Scope of Work on PFCE
- ___ Position Descriptions have measurable criteria on patient education with specific performance standards.

Departmental Policy and Procedure Manuals are being developed that contain the following:

- ___ Title Page
- ___ Introduction
- ___ Definition of Terms
- ___ Mission, Vision, Philosophy of Care
- ___ Purpose/Goals of Practice
- ___ Functions and Responsibilities
- ___ General Functions
- ___ Responsibilities of Clients, Informed Consent
- ___ Additional Sections (as desired) Date each page
 - ___ Procedures
 - ___ Standing Orders:
 - ___ Protocols
- ___ Orientation Program
- ___ In-service Education, Continuing Education
- ___ Quality Assurance
- ___ Policies and Procedures Approved by the Governing Board, Medical Staff and Administration
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- ___ Annual Patient Education Work Plan

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- ___ Budget/Spending Plans for Patient Education
- ___ Clinic/Hospital Organizational Chart
- ___ Any Grant Proposals for Patient Education
- ___ Goals and Objectives Statement
- ___ Monthly Reports
- ___ Quarterly Reports
- ___ Year-End Reports
- ___ Patient Right's and Responsibilities
- ___ Personnel File
- ___ Quality Assurance
- ___ Position Descriptions
- ___ Scope of Work for Patient Education
- ___ Any Strategic Planning for Patient Education
- ___ Workshops/Training/In-Service Education documentation